Creating a Bridges Plan

Ohio Department of Children & Youth

Knowledge Base Article

Creating a Bridges Plan

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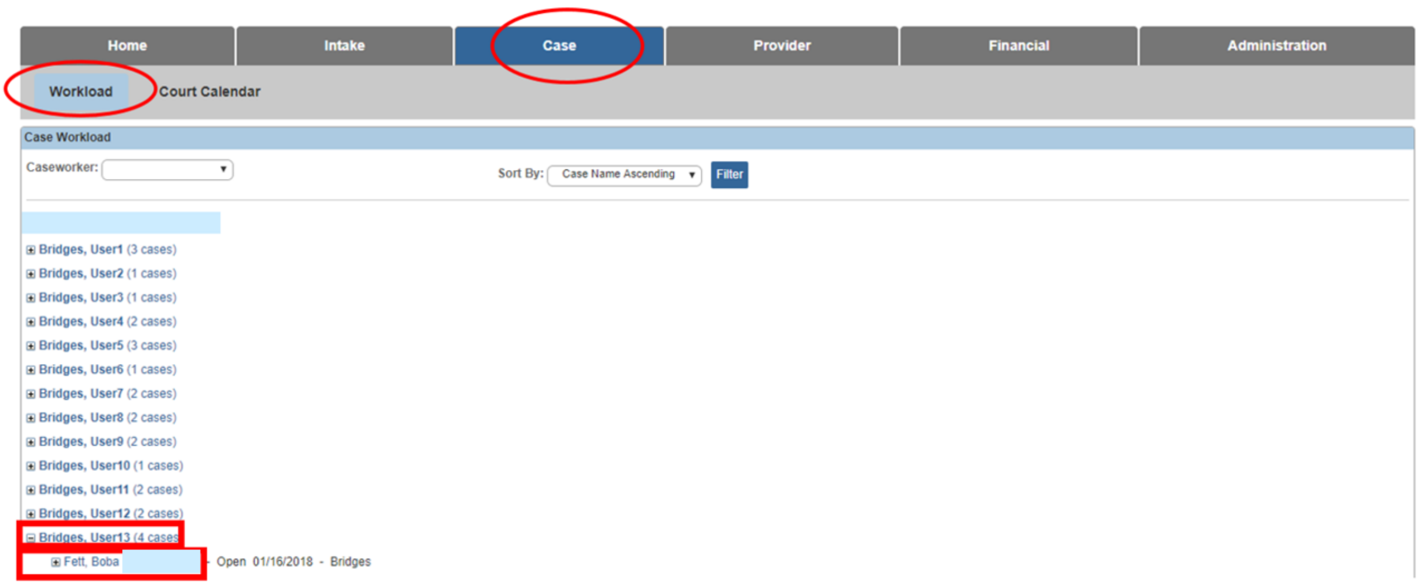
Overview

This document provides step-by-step instruction for creating a Bridges Plan.

Navigating to the Bridges Plan

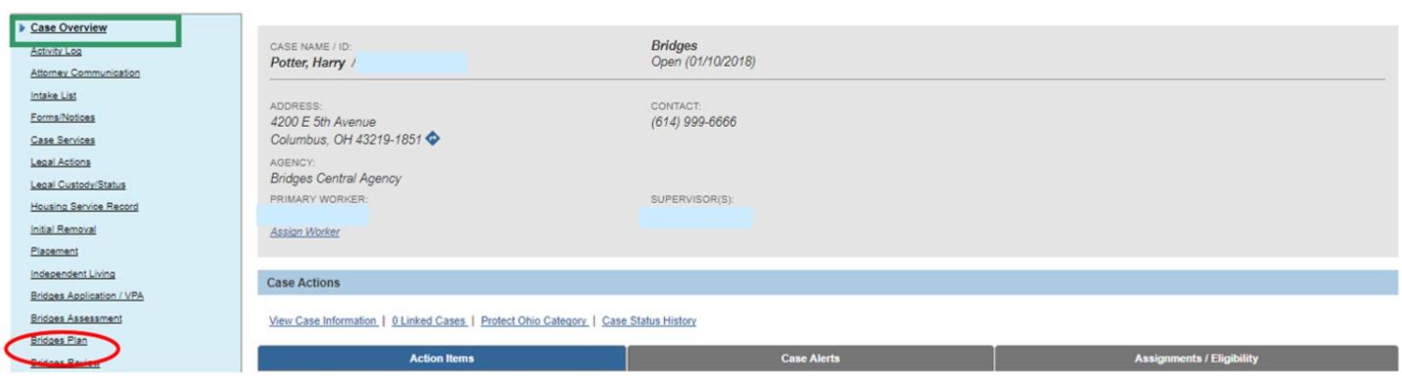
From the Ohio SACWIS home page:

1. Click, **Case**.
2. Click, **Workload**.
3. Click the name of the appropriate **Caseworker**.
4. Click the relevant case number.



The **Case Overview** screen appears.

5. Click, **Bridges Plan** in the navigation pane.



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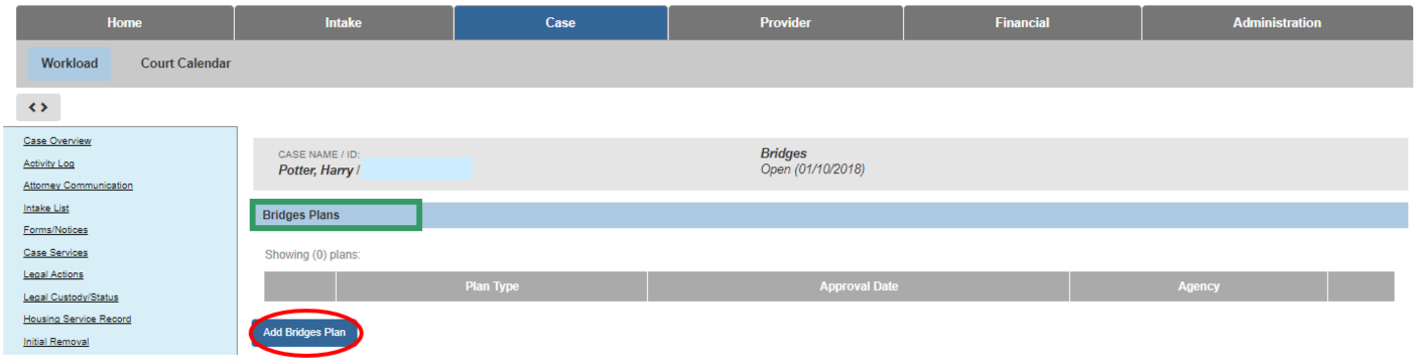
The **Bridges Plans** grid appears.

6. Click, **Add Bridges** Plan.

   Important: An initial assessment must be completed before the initial Bridges Plan can be approved.

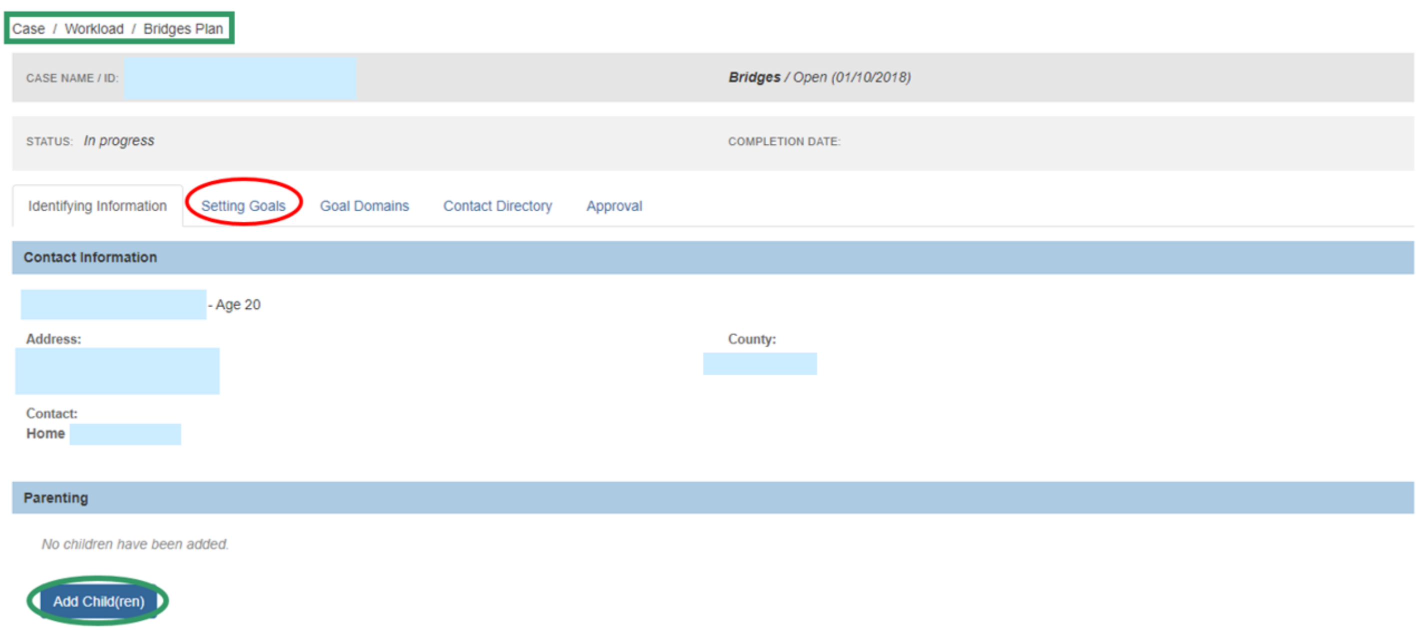


The **Bridges Plan** screen appears; the **Identifying Information** tab is highlighted.

7. Click the **Setting Goals** tab and skip to the section titled: **Completing the Setting Goals Tab**.

   OR, If the young adult has children, click **Add Child(ren)** and see the **Adding a Child(ren)** section below.

   Note: Your information will be saved as you navigate among the tabs.

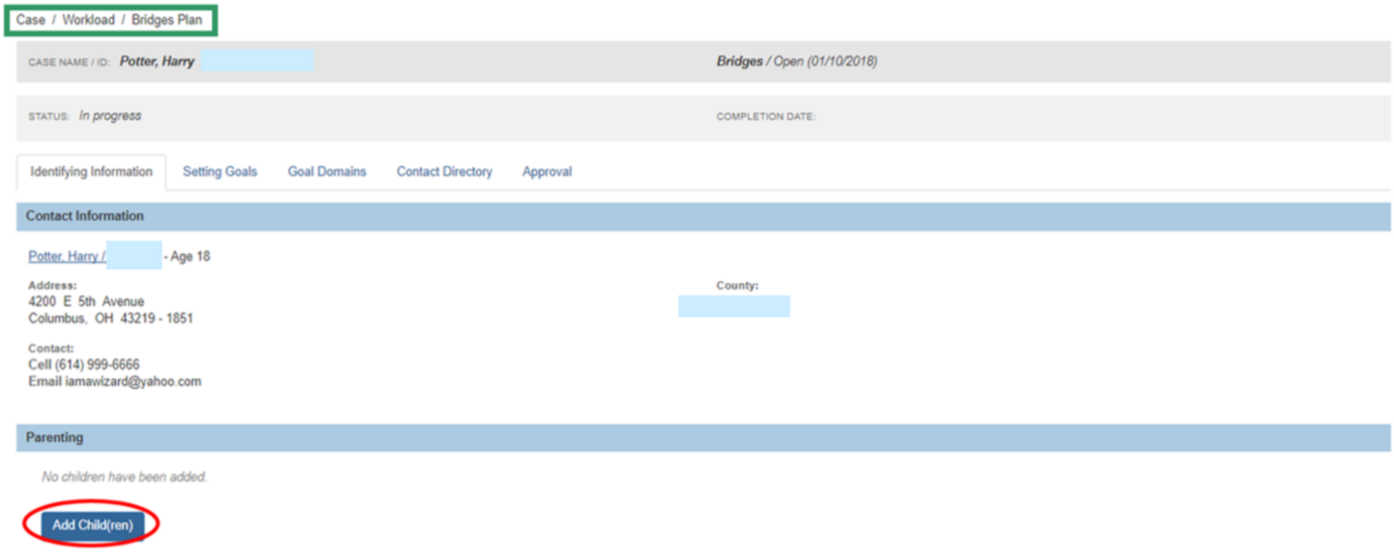


Adding a Child(ren)

Adding an Available Child(ren)

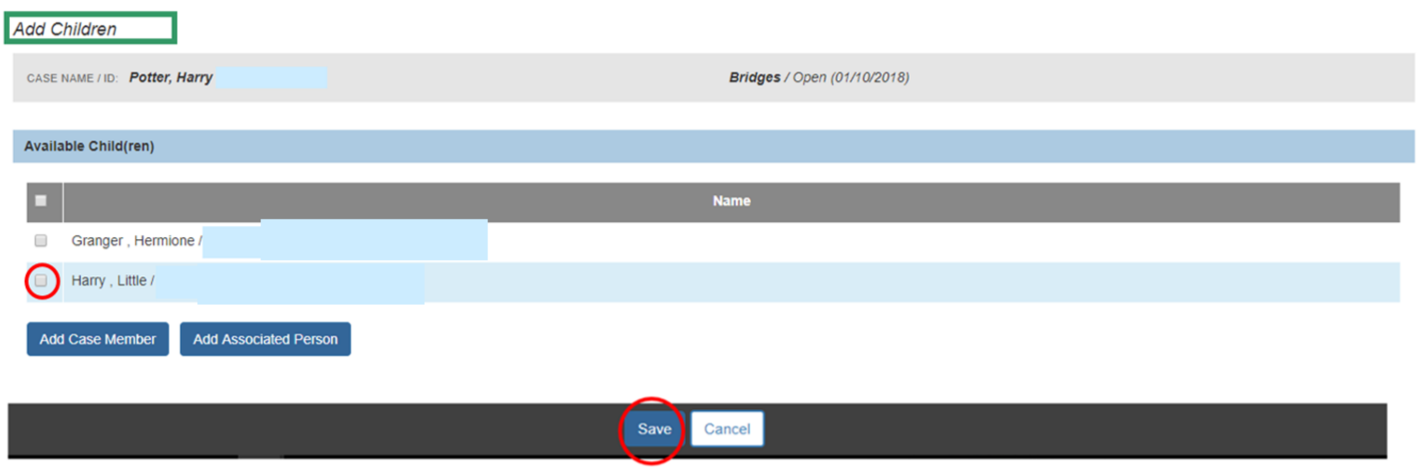
From the **Bridges Plan** screen:

1. Click, **Add Child(ren)**.



The **Add Children** screen appears.

2. If there are already children listed in the **Available Child(ren)** grid, place a checkmark in the checkbox of the appropriate child(ren).
3. Click, **Save**.



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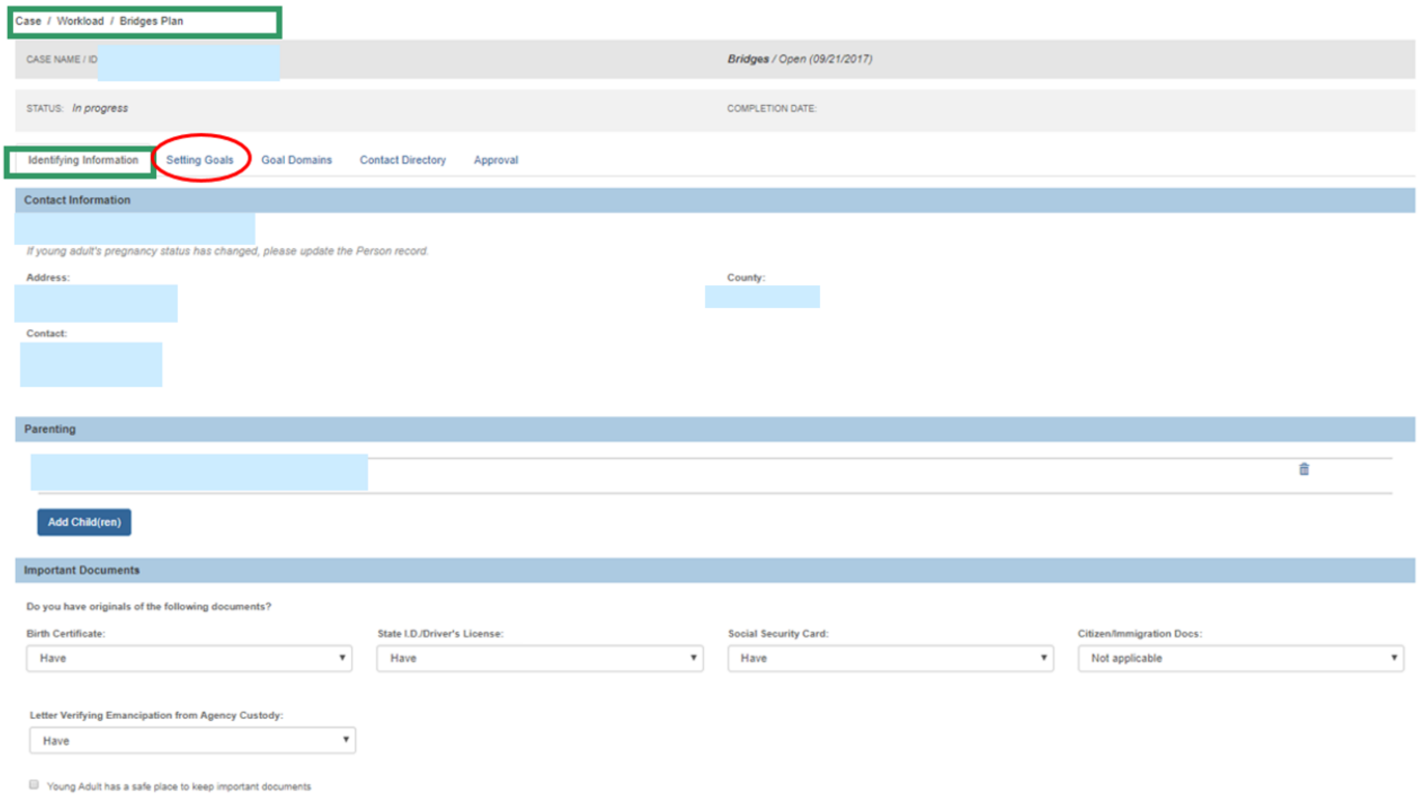
The **Bridges Plan** screen appears, with the **Identifying Information** tab highlighted. The added child(ren) is listed in the **Parenting** grid.

> **Note**: If a child needs to be added to the Bridges Plan, but is unknown to Ohio SACWIS, please refer to the following KBA for instruction on adding a person: Managing Person-Level Relationships.

4. Make selections from the drop-down menus in the **Important Documents** grid.
5. Click the **Setting Goals** tab.



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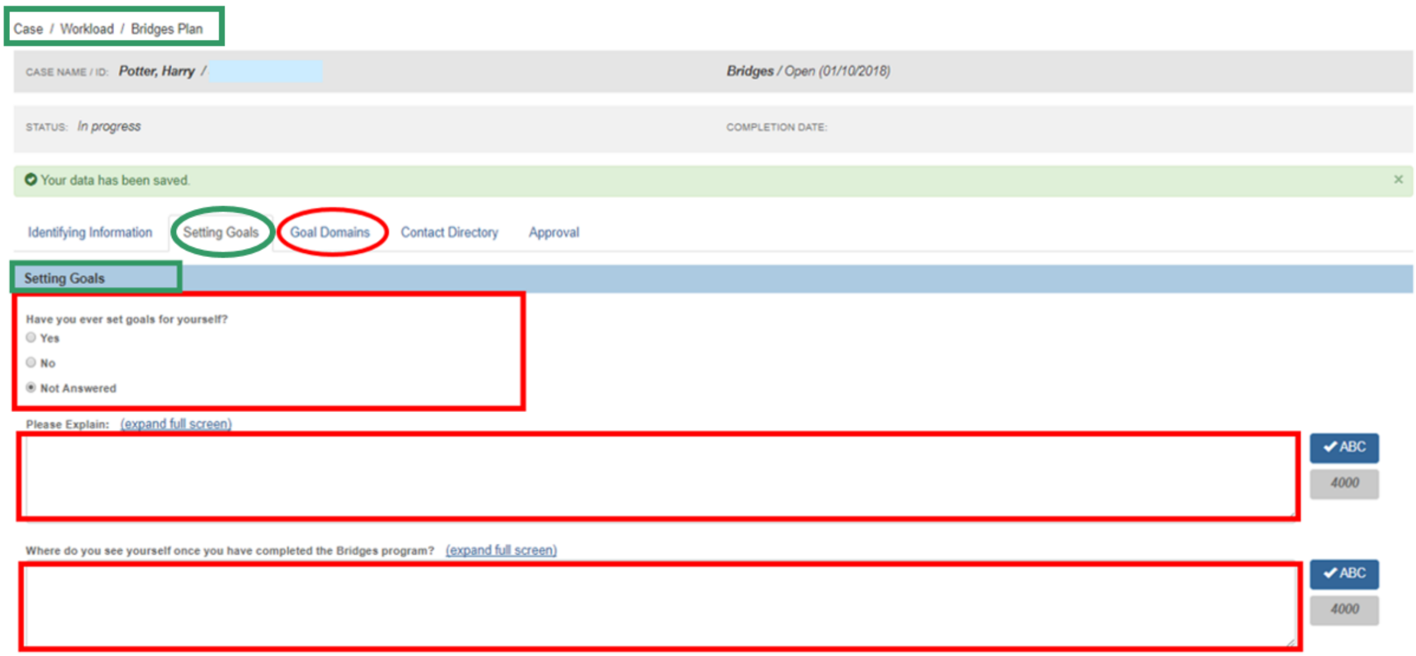
The **Bridges Plan** screen appears with the **Setting Goals** tab highlighted.

Completing the Setting Goals Tab

1. Select the radio button beside the appropriate answer to the question: **Have you ever set goals for yourself?**
2. Enter narrative in the text boxes.
3. Click the **Goal Domains** tab.



The **Goal Domains** grid appears.

> **Note**: There are seven entries in the Goal Domains list. As you go through the setting goals process, select the domains that are relevant to the young adult.
>
> **Important**: Whatever goal domains are selected, the overall process for setting goals is the same, but the screens requesting information will vary depending on your specific domain selection. The example below provides instruction on completing the **Self-Development and Healthy Relationships** goal domain.

4. Click the **Inactive** box beside **Self-Development and Healthy Relationships**.

   Important: This will cause the corresponding goal domain title to become an active link.

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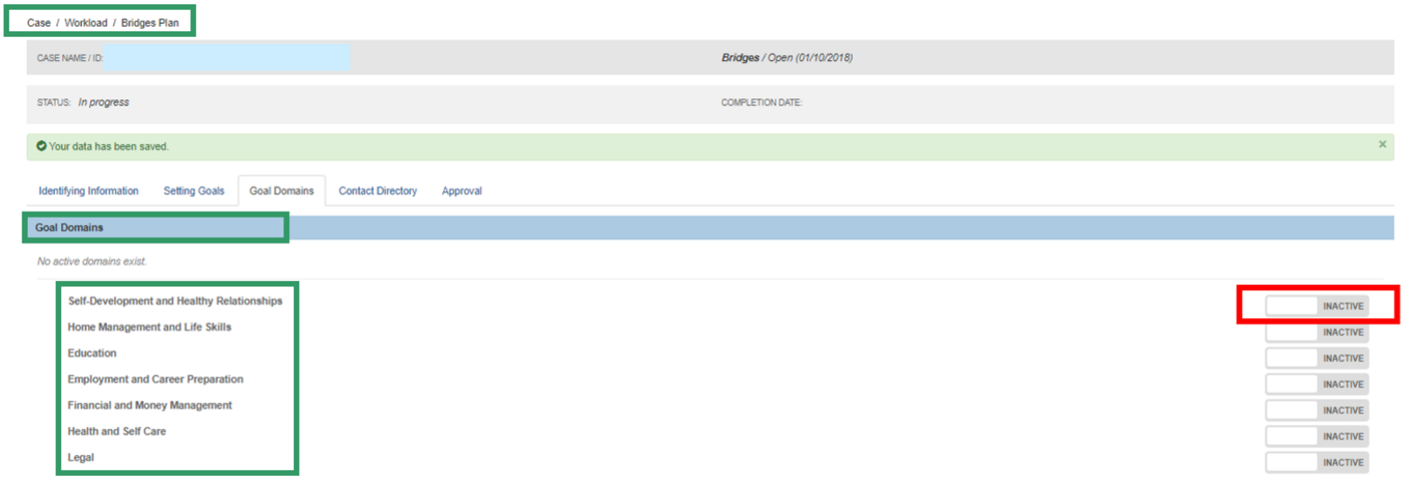
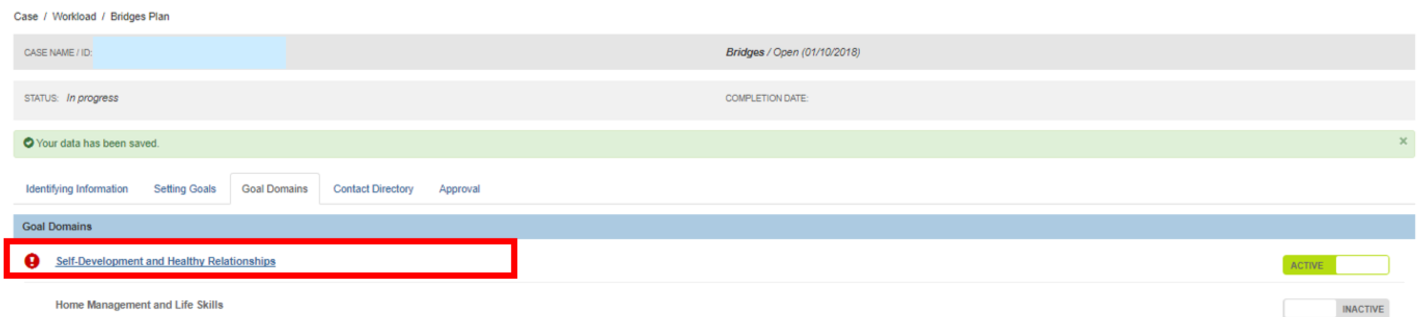


Once the link is active:

5. Click the **Self-Development and Healthy Relationships** link.

   Note: The red circle with the white exclamation mark indicates the section is incomplete; the symbol will remain until the section is complete.



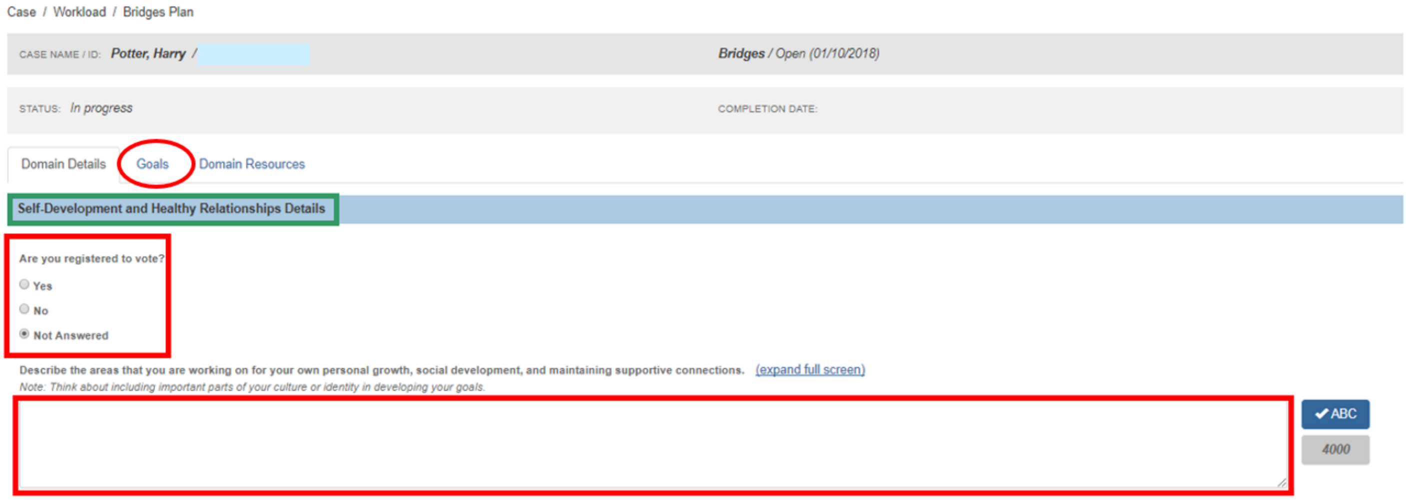
The **Self-Development and Healthy Relationships Details** grid appears.

Completing the Self-Development and Healthy Relationships Link

1. Select an answer to the question, **Are you registered to vote**?
2. Enter narrative in the text box.

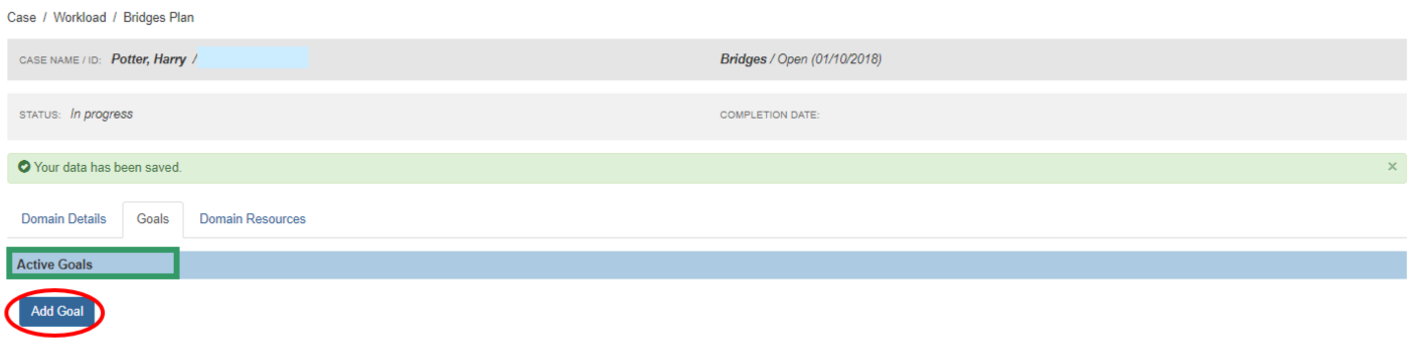
   Note: If you answer in the affirmative to the first question, you will be prompted to answer the question: **Is your registration address up to date?**

3. Enter narrative in the text box.
4. Click the **Goals** tab.



The **Active Goals** grid appears.

5. Click, **Add Goal**.



The **Add/Edit Goal** screen appears.

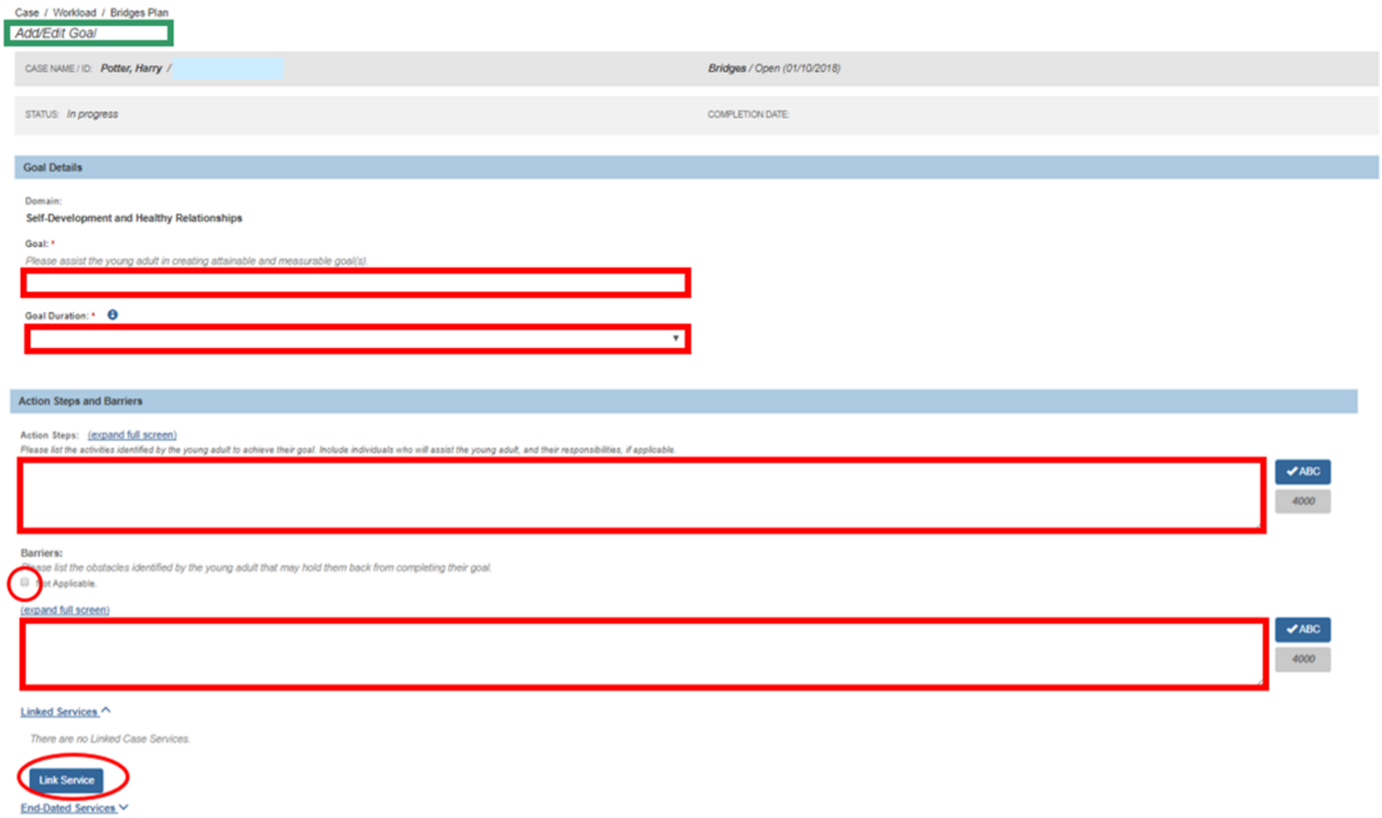
Adding Goals

In the **Goal Details** grid:

1. Enter a goal(s) in the text box under Goal.
2. Select, either **Short Term** or **Long Term**, from the drop-down menu under **Goal Duration**.
3. Enter narrative in the text boxes.

Note: If there is no narrative to enter in the Barriers text box, put a checkmark in the **Not Applicable** checkbox.

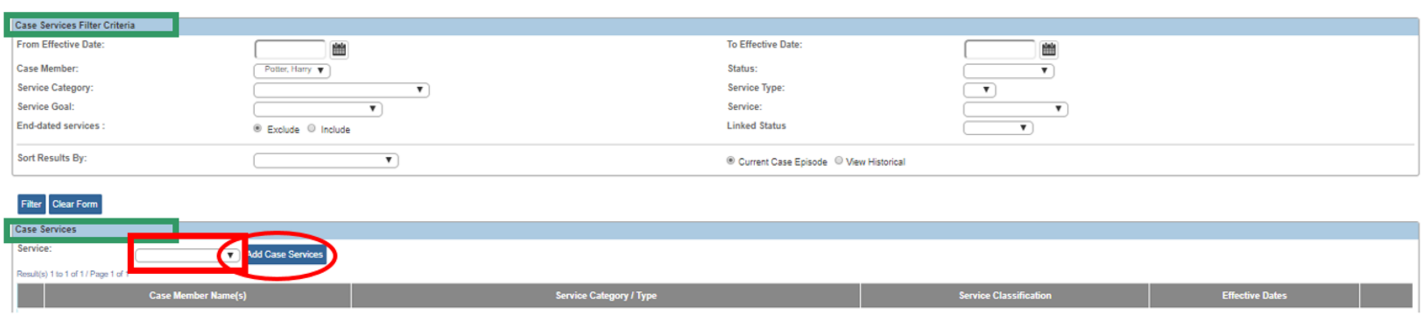
4. Click, **Link Service**.



The **Case Services Filter Criteria** grid appears.

Adding Case Services

1. In the **Case Services** grid, select **Case Member** from the **Service** drop-down menu.
2. Click, **Add Case Services**.



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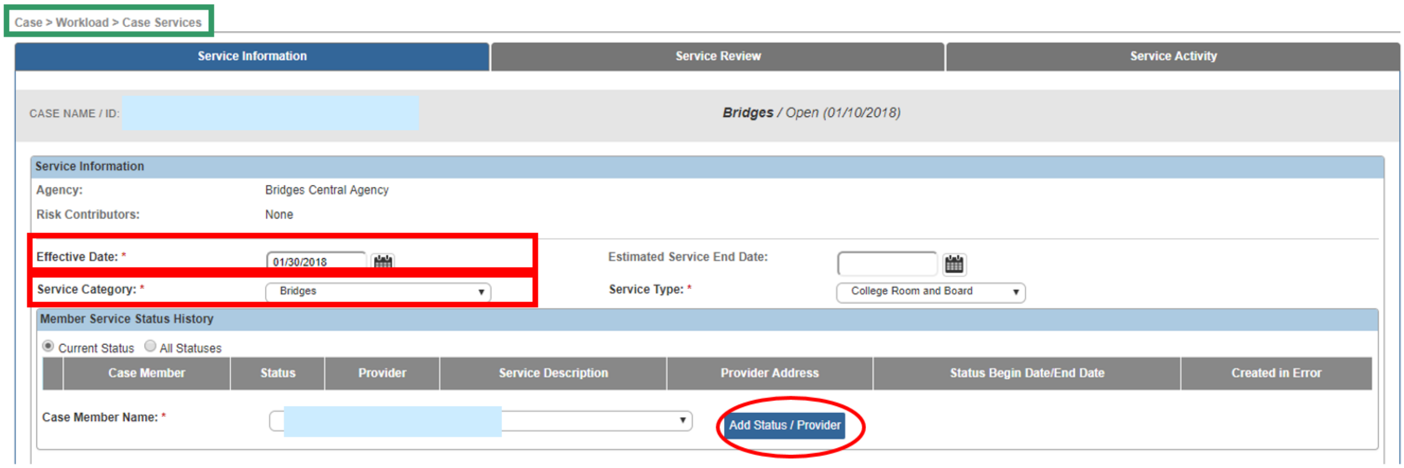
The **Case Services** screen appears.

3. Enter the **Effective Date**.
4. Make a selection from the **Service Category** drop-down menu.
5. Make a selection from the **Service Type** drop-down menu.
6. Make a selection from the **Case Member Name** drop-down menu.
7. Click, **Add Status/Provider**.

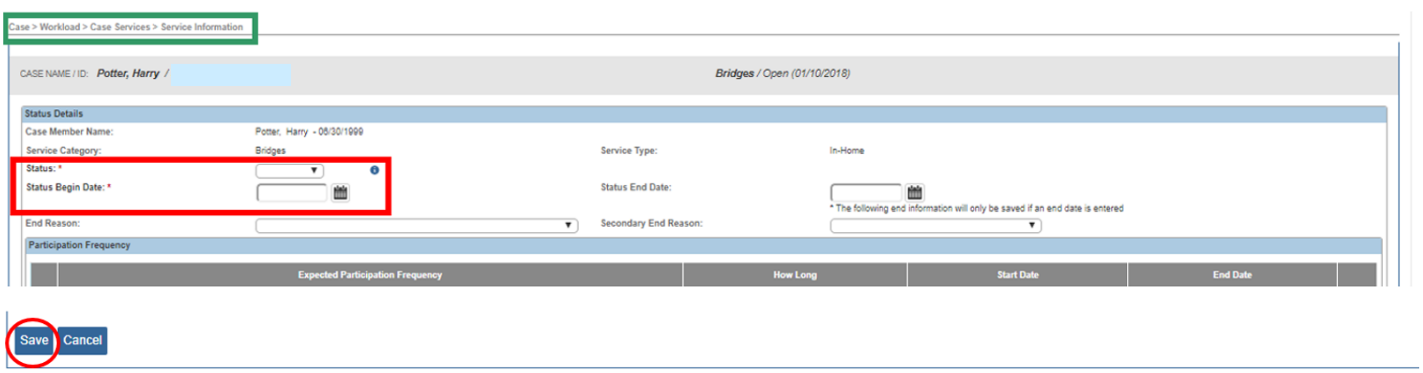


The **Service Information** screen appears.

8. Select, **Needed**, from the **Status** drop-down menu.

Important: If a selection other than "Needed" is made from the Status drop-down menu, Ohio SACWIS will display the following message: **A Provider record must be linked for member service status records of Referred, Scheduled and Provided**. If necessary, please see the following Knowledge Base Article for information regarding linking a Provider record: Managing Case Services.

9. Enter the **Status Begin Date**.
10. Click, **Save**.



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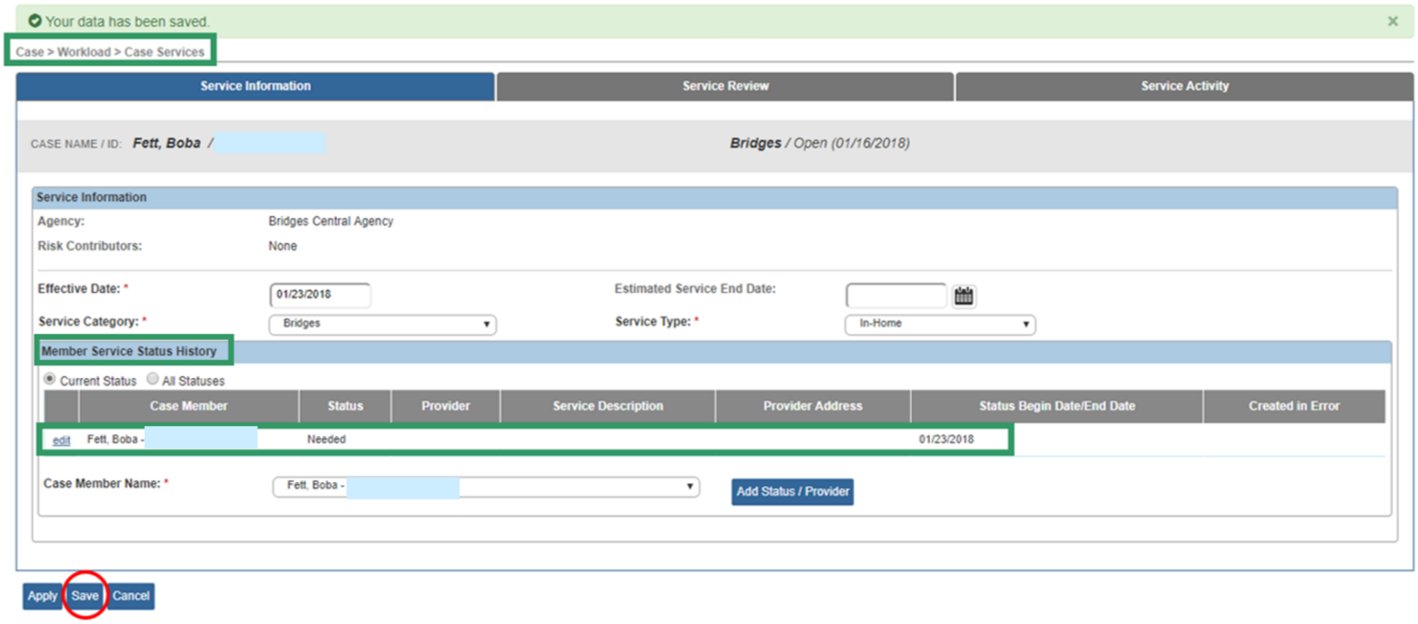
The **Case Services** screen appears, displaying the current status of the service in the **Member Service Status History** grid.

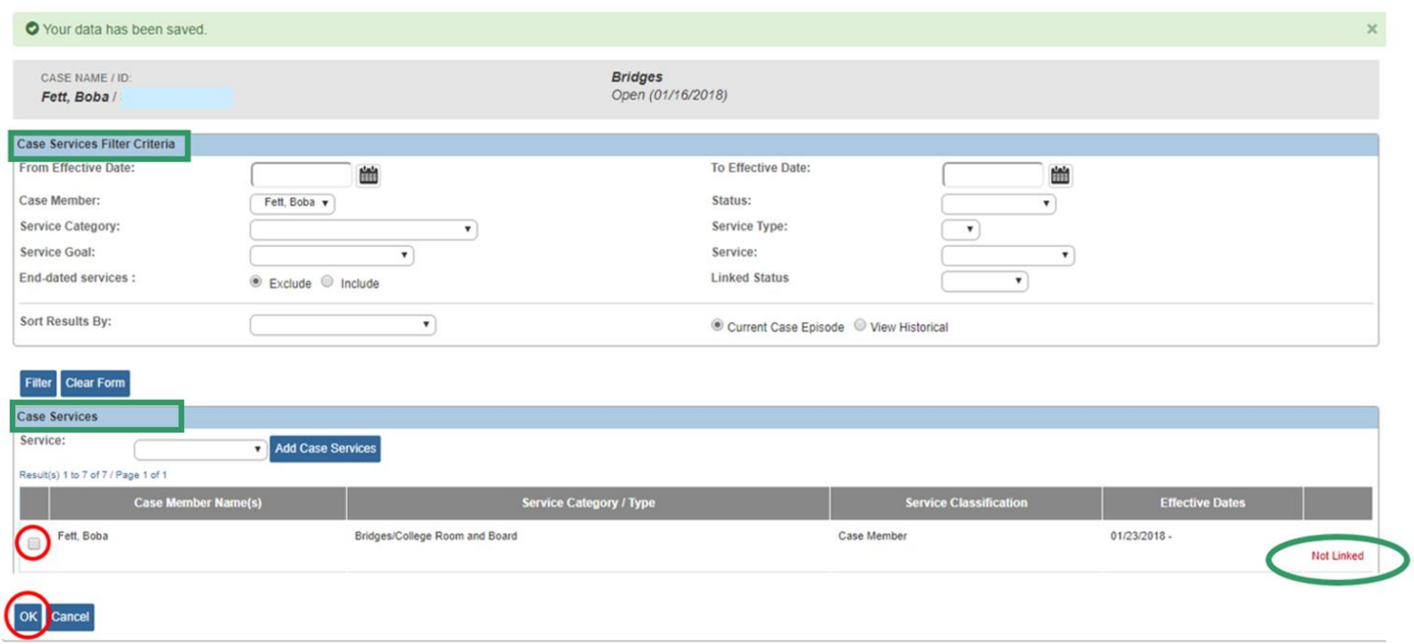
11. Click, **Save**.



The **Case Services Filter Criteria** screen appears.

Important: *The services are not yet linked to the Bridges Plan*.

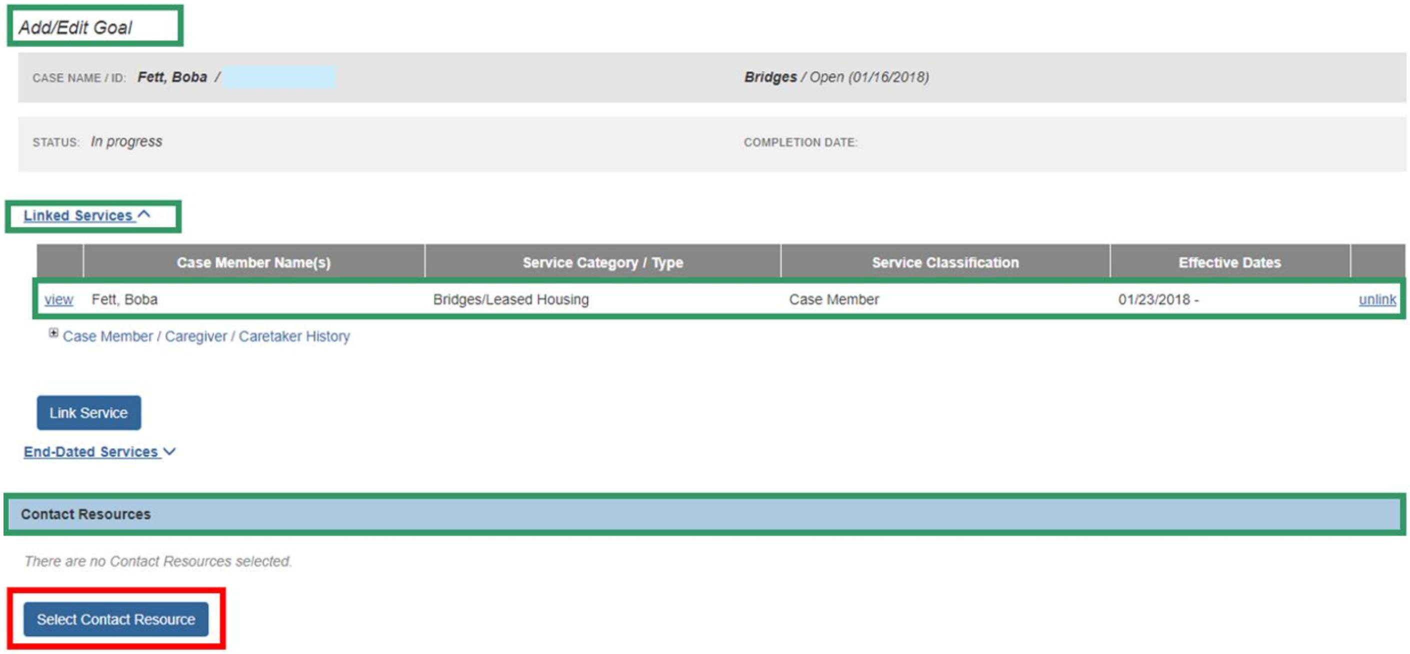
12. Place a checkmark in the checkbox beside the Case Member name in the **Case Services** grid.
13. Click, **OK**.



The **Add/Edit Goal** screen appears, displaying the linked service in the **Linked Services** grid.

Selecting a Contact Resource

1. Click, **Select Contact Resource** in the **Contact Resources** grid.



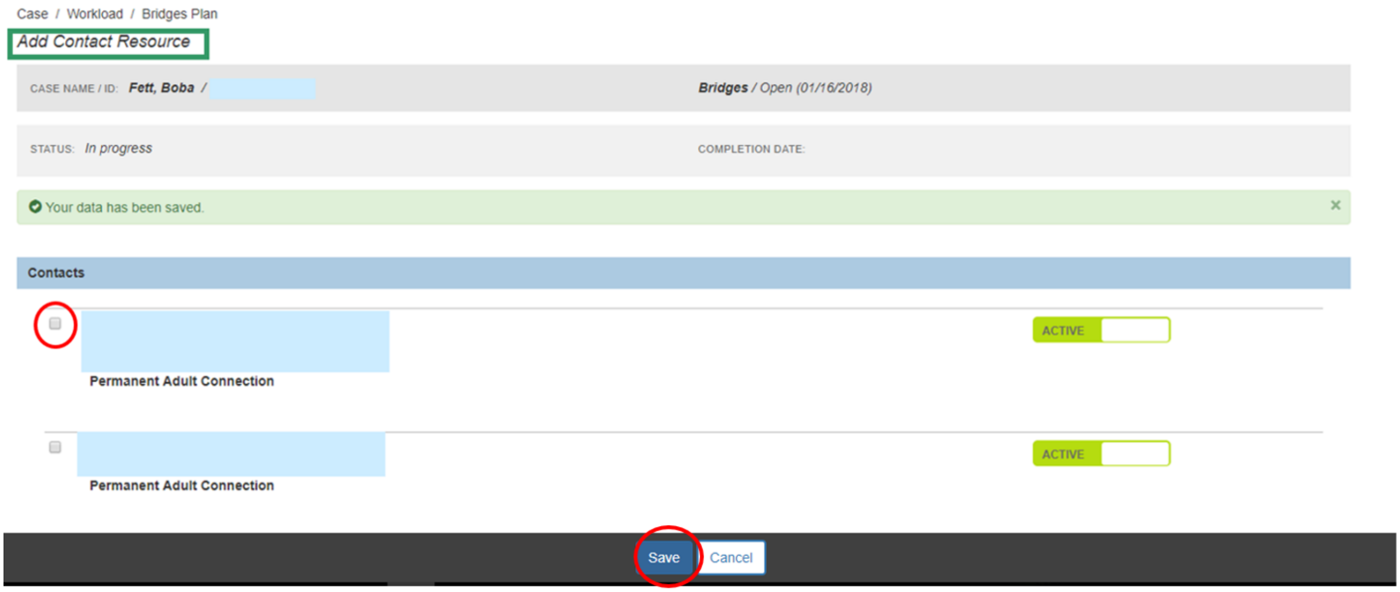
The **Add Contact Resource** screen appears, displaying a list of contacts (Active and Inactive) relevant to the young adult.

Important: If a Contact Resource is added, the individual should be someone who can help the young adult with a specific goal(s). The contact must have an **Active** status for it to be available to add to the Bridges Plan.

2. Place a checkmark in the checkbox beside the individual you wish to add as a Contact Resource.
3. Click, **Save**.

Important: If it is necessary to add a contact person who is not already part of the case, see instructions for **Creating a New Contact** below.

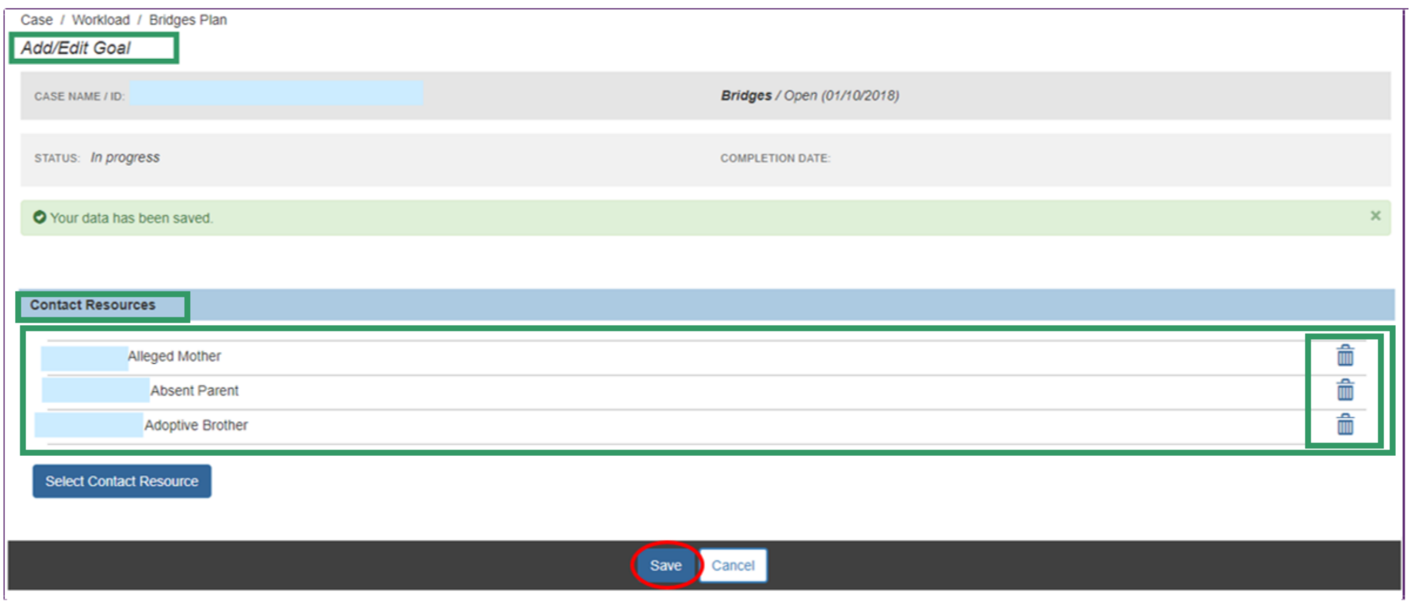
Note: If there is no Contact Resource(s), it is not necessary to click the Select Contact Resource button.



The **Add/Edit Goal** screen appears, displaying the added person(s) in the **Contact Resources** grid.

4. Click, **Save**.

Note: If a Contact Resource is no longer associated to a particular goal(s), delete the resource by clicking the trash can icon in the Contact Resources grid.



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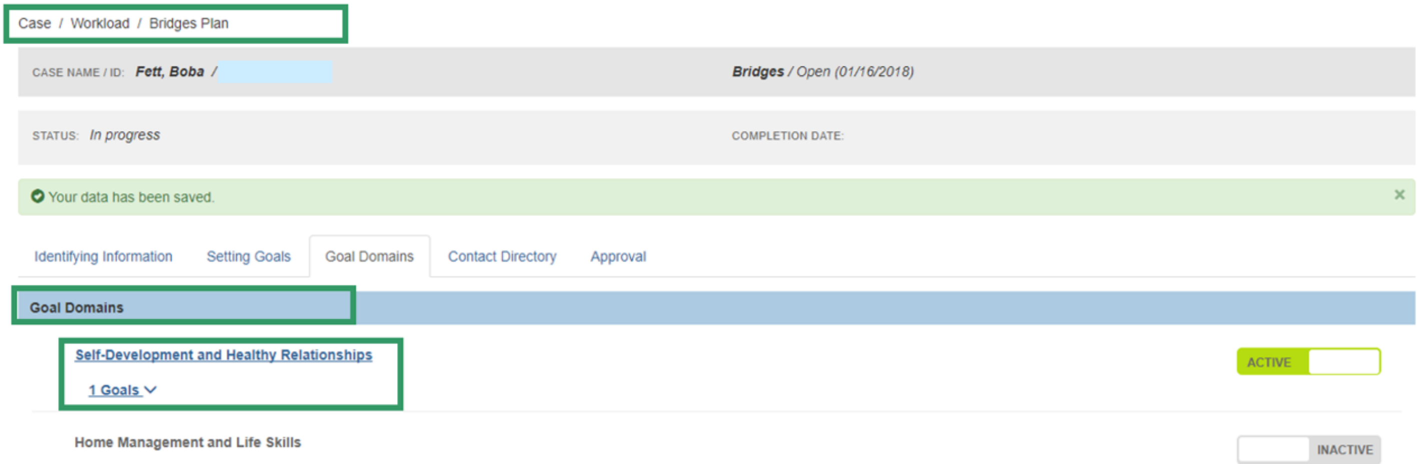
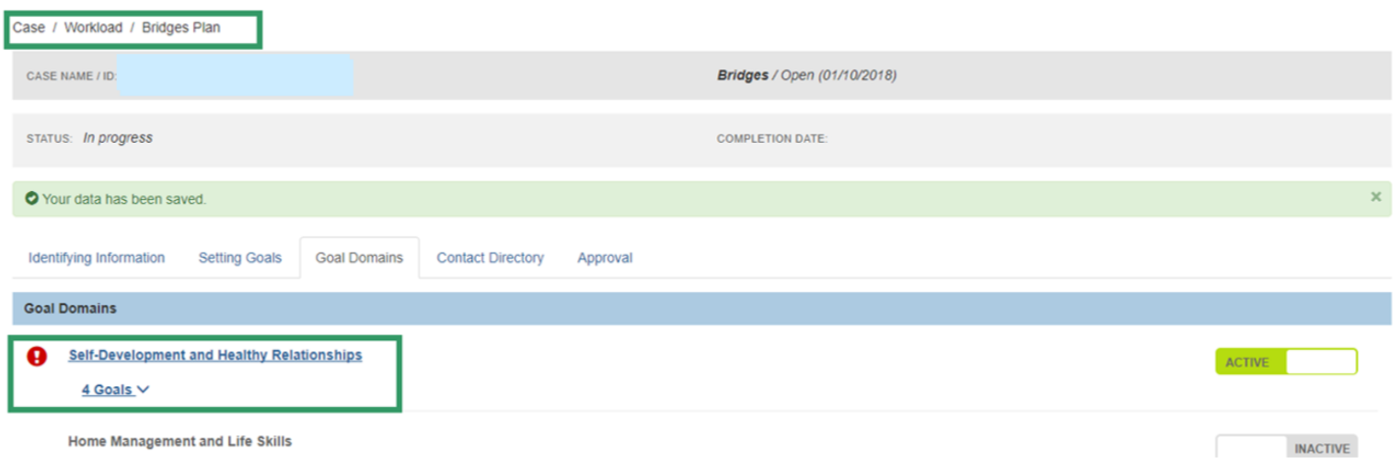
The **Bridges Plan** screen appears, displaying the number of goals in the **Active Goals** grid.



Important: You can add as many goals as necessary for each domain by repeating the Adding Goals section.



5. Click the Inactive box beside any other goal domain relevant to the young adult and follow the instructions above for Adding Goals.

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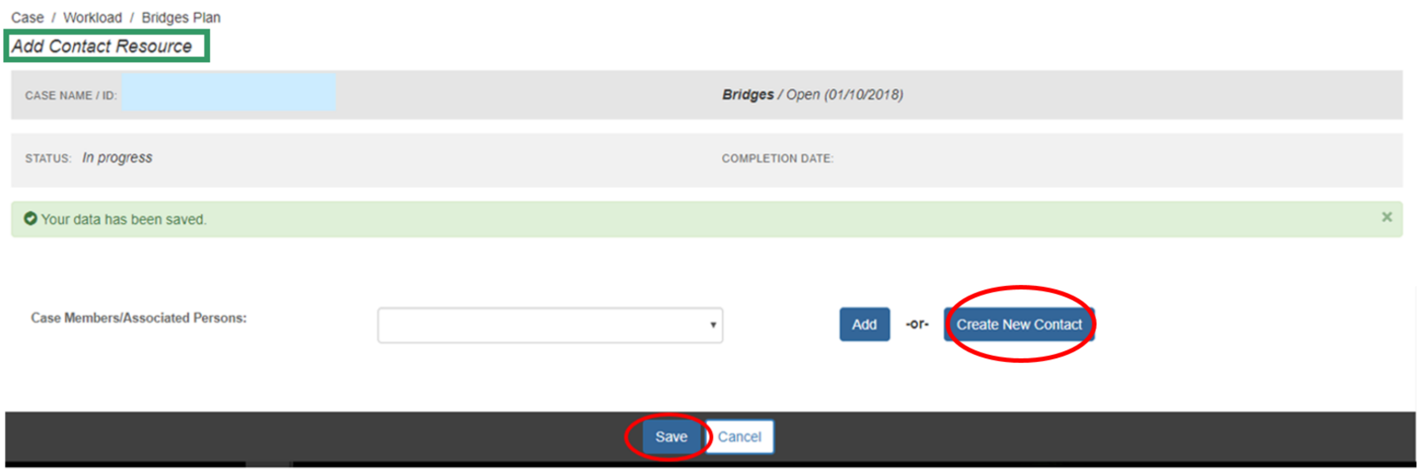
Creating a New Contact

From the **Add Contact Resource** screen:

1. Click, **Create New Contact**.

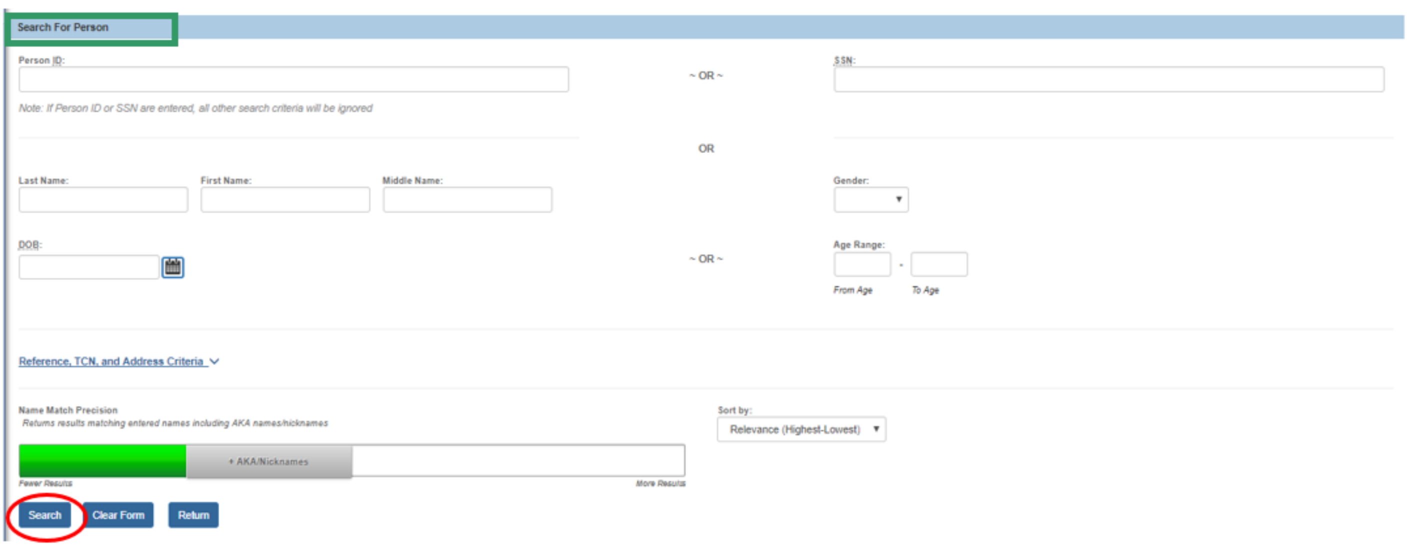
The **Contact Details** grid appears.

2. Click, **Search Person**.



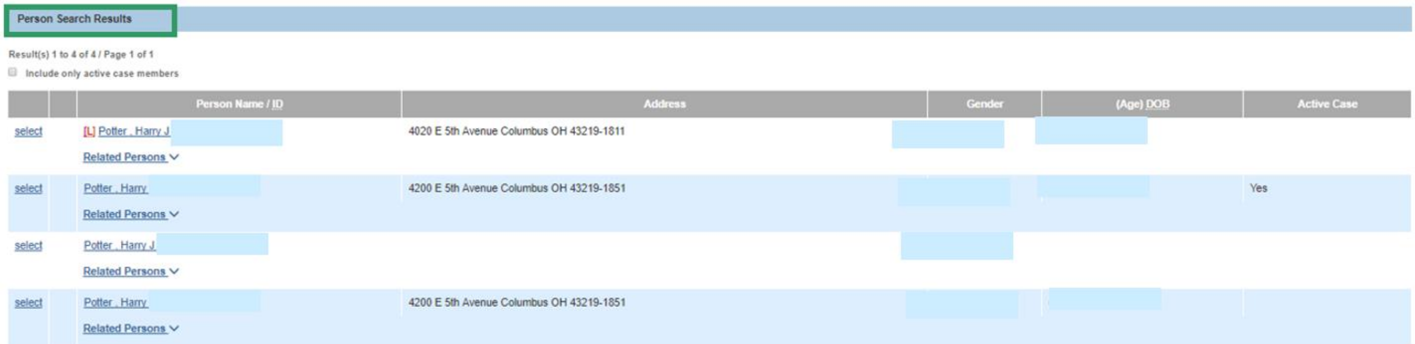
The **Search for Person** grid appears.

3. Click, **Search**.



Person Search Results grid appears.

4. Click, **select**, beside the name of the appropriate person.



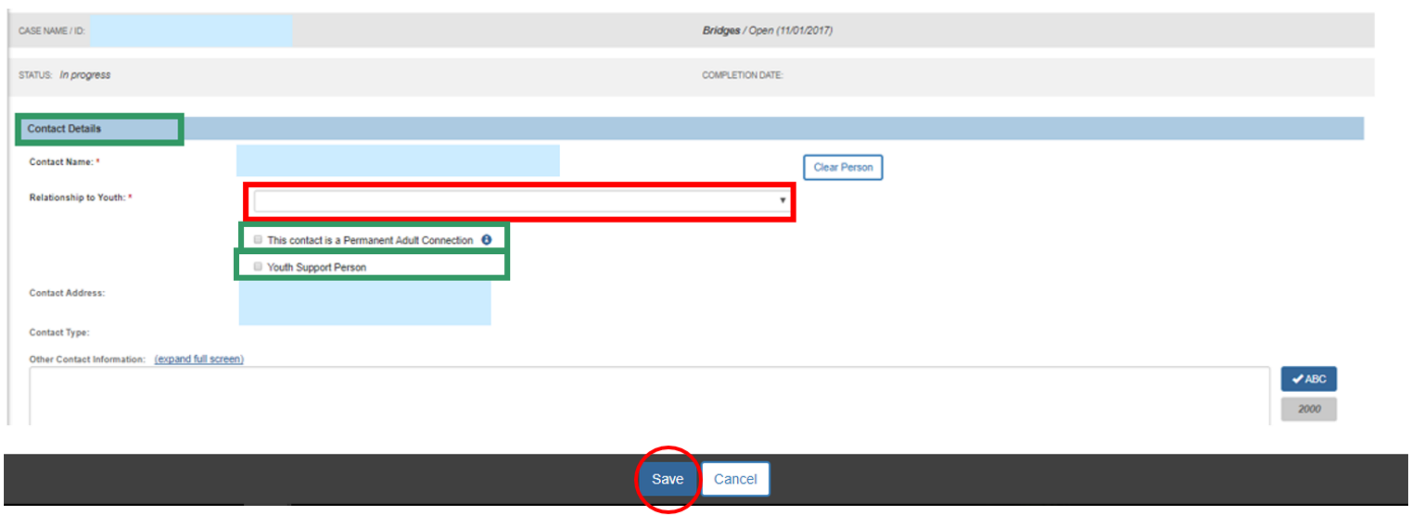
The **Contact Details** grid appears.

5. Make a selection in the **Relationship to Youth** drop-down menu.

If necessary, place a checkmark in the checkbox beside **This contact is a Permanent Adult Connection**, or in the checkbox beside **Youth Support Person**.

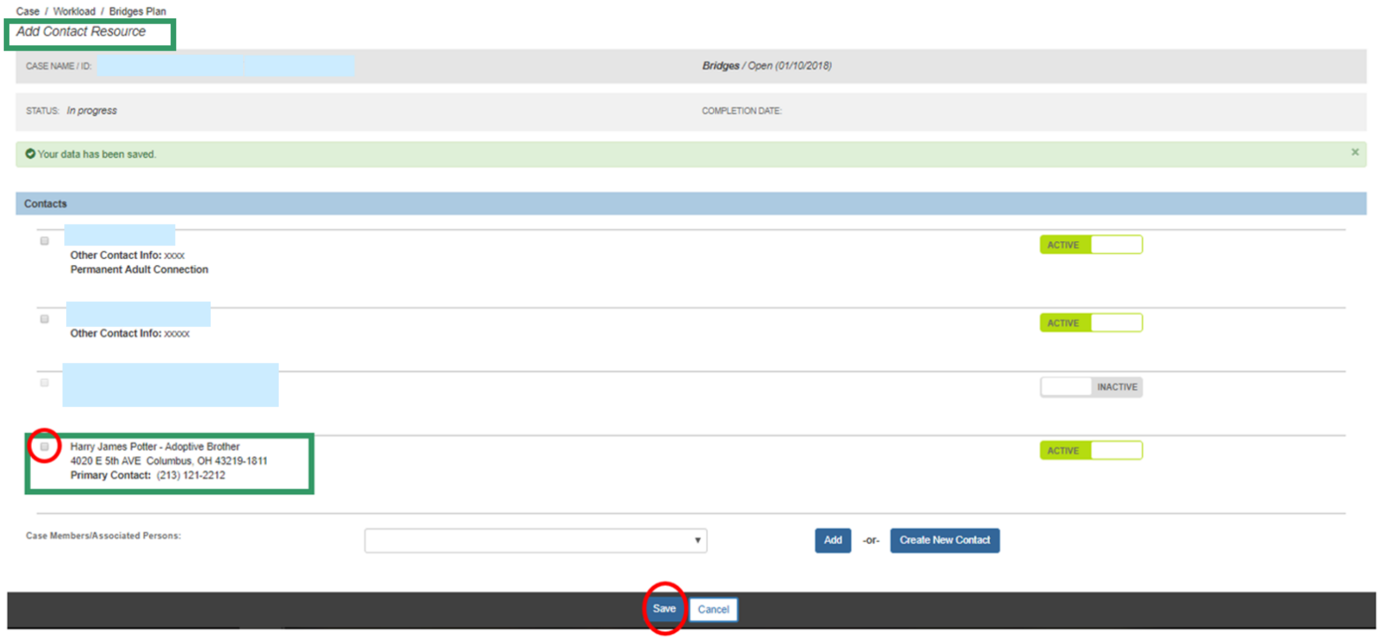
You have the option to add information in the **Other Contact Information** text box.

6. Click, **Save**.



The **Add Contact Resource** screen appears, displaying the new contact.

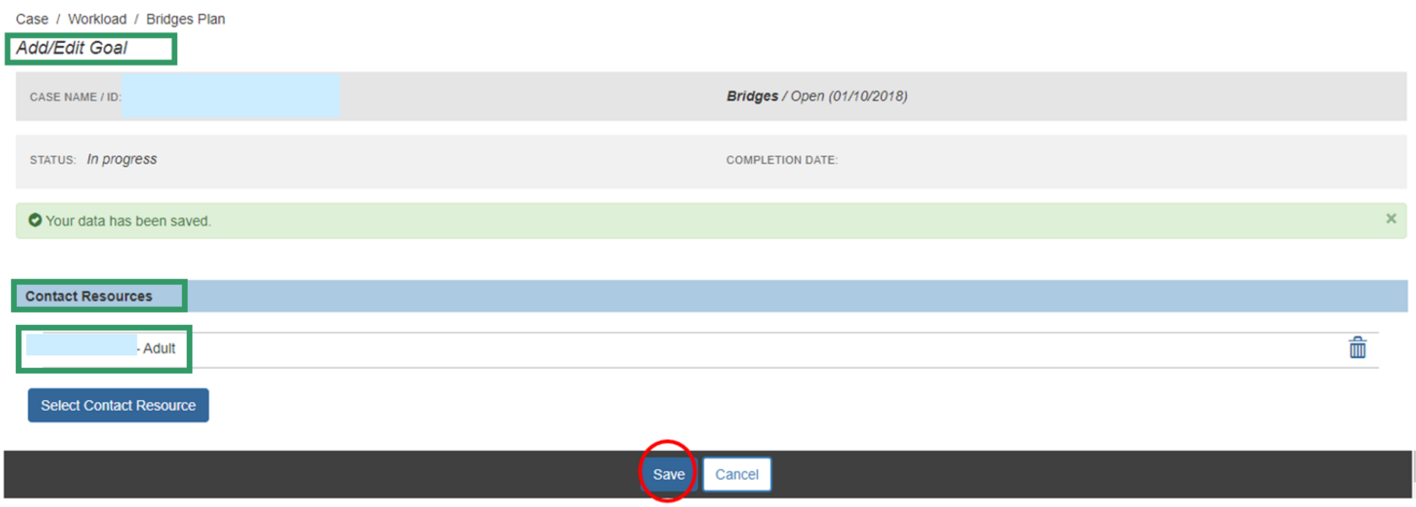
7. Place a checkmark in the checkbox beside the appropriate person.
8. Click, **Save**.



The **Add/Edit Goal** screen appears, displaying the contact resource(s) in the **Contact Resources** grid. This process adds the **Contact Resource** to the list under the **Contact Directory** tab.

> **Note**: A contact can also be added via the Contact Directory tab.

9. Click, **Save**.

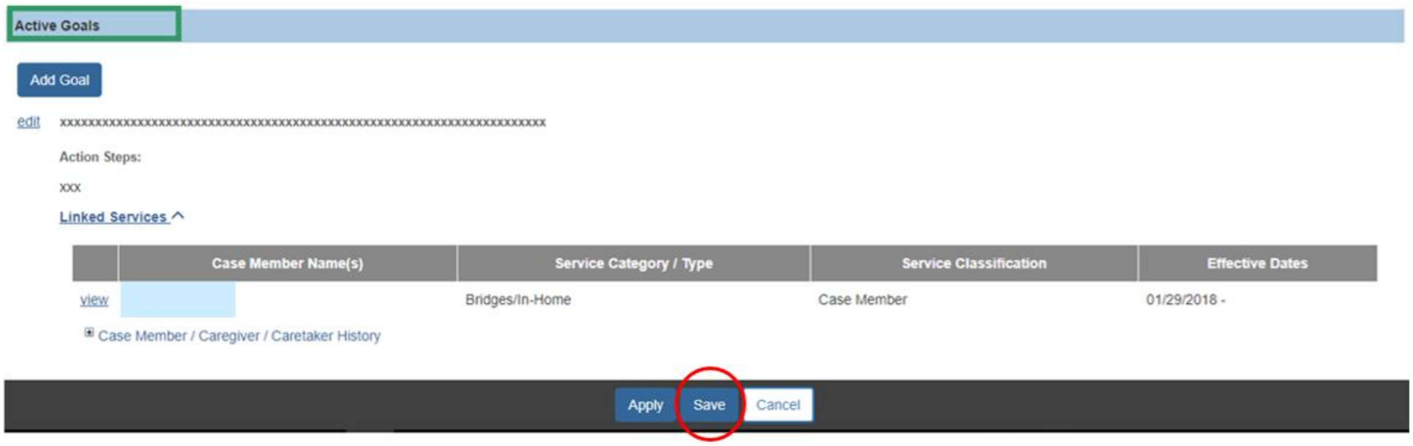


The **Active Goals** grid is displayed.

10. If you are finished, click, **Save**.

OR,

Follow instructions previously provided to complete another Goal Domain(s).



> **Note**: Each Goal Domain area has a tab labeled, **Doman Resources**. The Domain Resources tab houses links to various websites that contain subject matter relevant to the specific Goal Domain.
>
> **Important**: *The same overall process of adding goals applies to each selected domain*; however, the specific information requested will vary for each domain. The screens will look different, depending on the selected domain.

Viewing/Editing the Contact Directory Tab

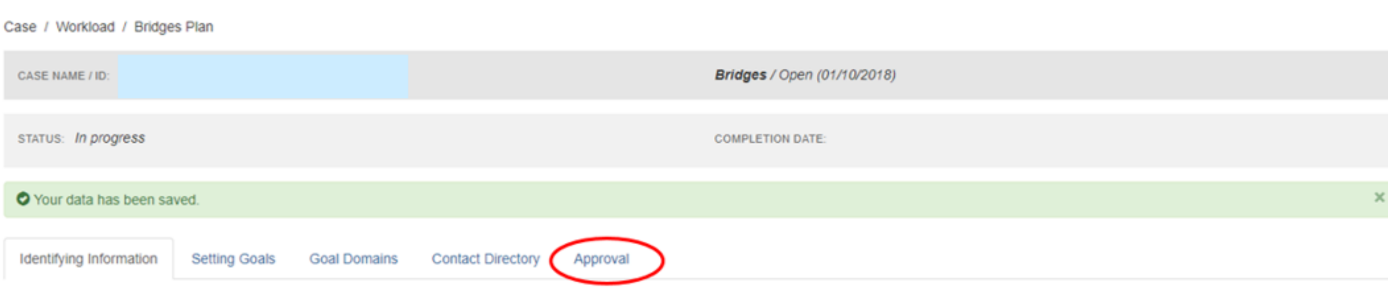
Click the **Contact Directory** tab to view a list of Active and Inactive contacts.

> **Note**: Until the Bridges Plan has been finished and saved, the Contact Directory can be edited to add and/or remove contacts.

Completing the Approval Tab

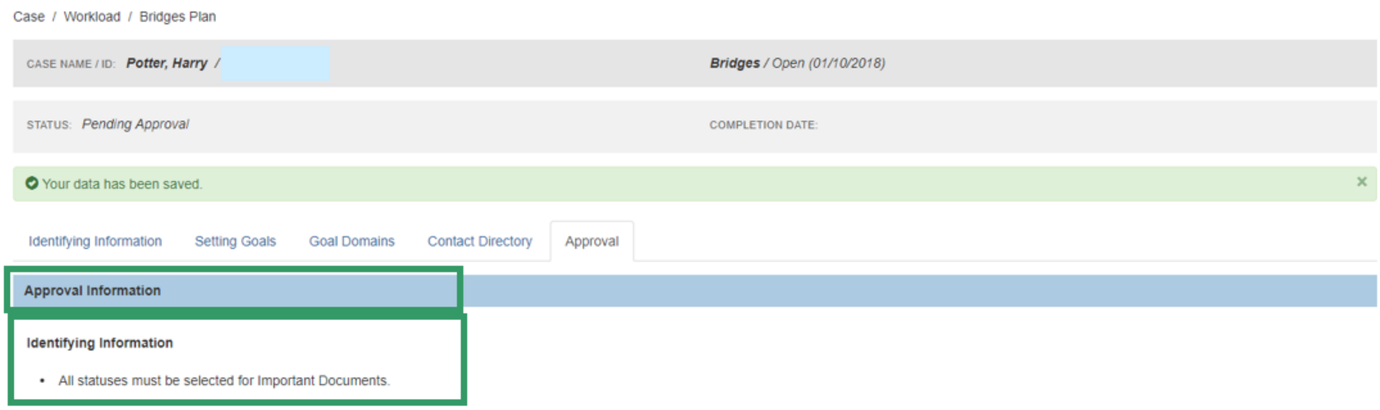
Once all the required information has been provided for the Bridges Plan:

1. Click the **Approval** tab.



The **Approval Information** grid appears.

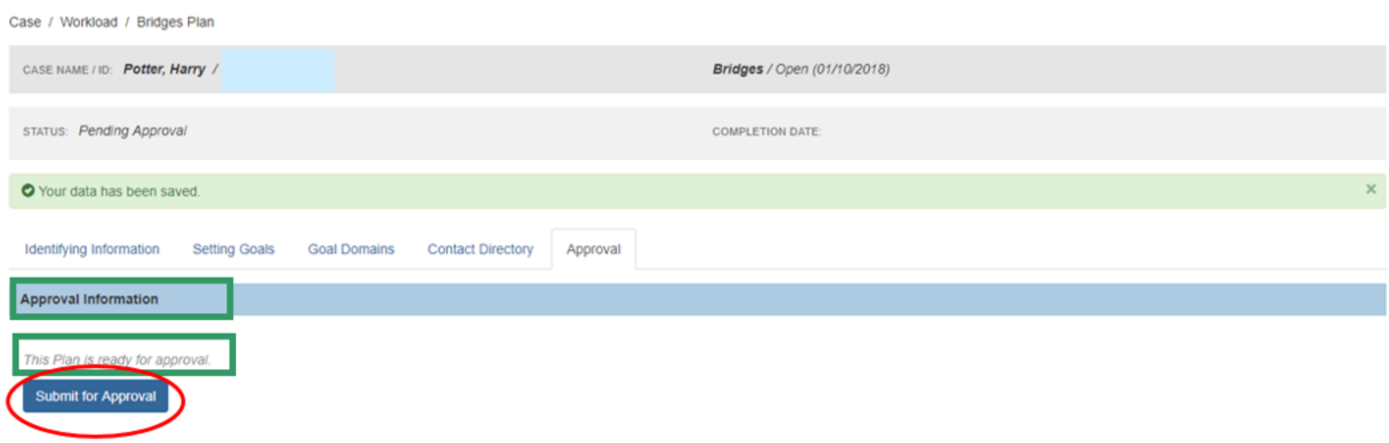
If all information required for the Bridges Plan *has not* been completed, the Approval Information grid will display a message(s) similar to the one below.



> **Important**: If you receive a message indicating the plan is incomplete, return to the tab(s) identified and complete the information.

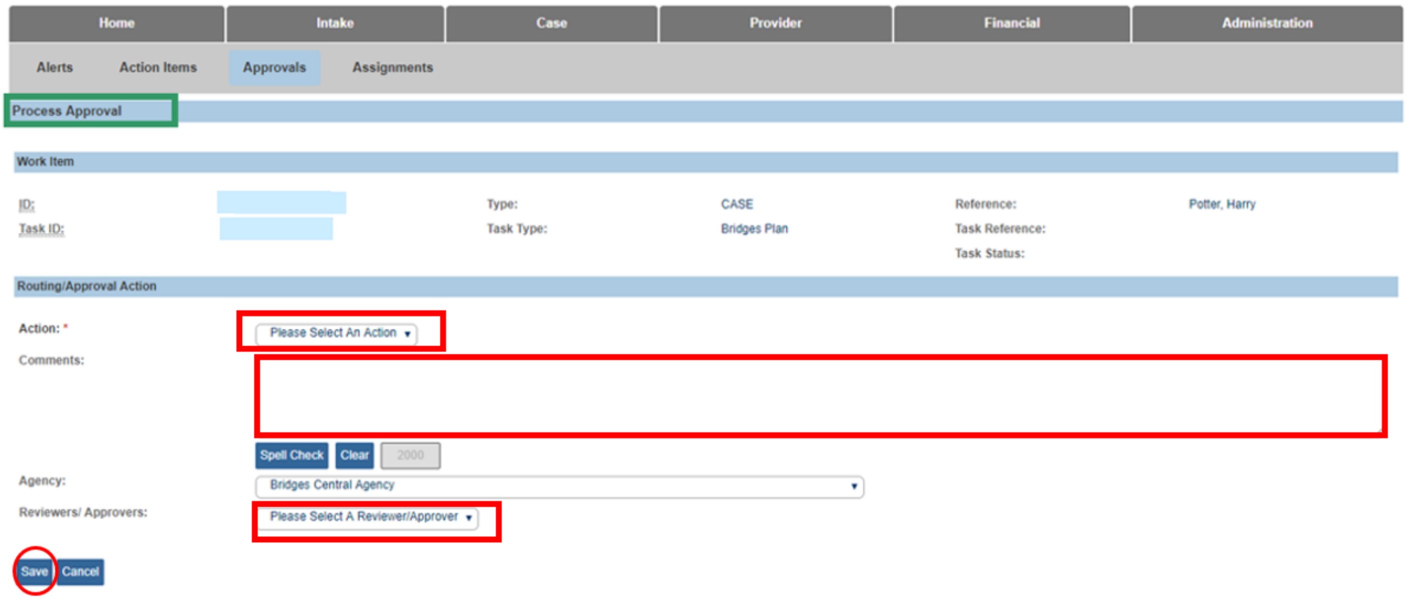
If all information for the Bridges Plan has been completed, the Approval Information grid will display the following message: **This Plan is ready for approval**.

2. Click, **Submit for Approval**.



The **Process Approval** screen appears.

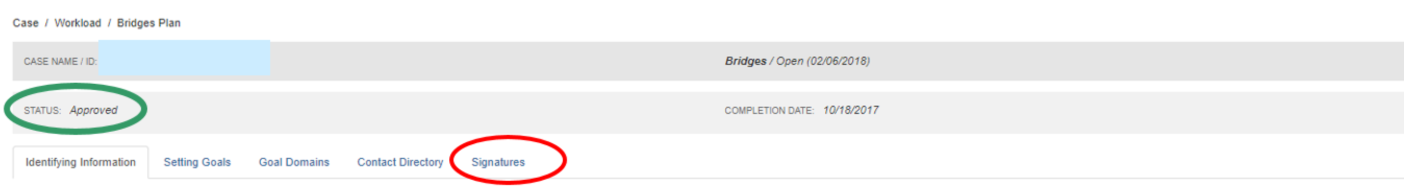
3. Make a selection from the **Action** drop-down menu.
4. If necessary, add narrative to the **Comments** text box.
5. Make a selection from the **Reviewers/Approvers** drop-down menu.
6. Click, **Save**.



Signing the Bridges Plan after Approval

Once the plan is approved, the **Signature** tab will appear on the **Bridges Plan** screen, and the Bridges worker will receive an action item advising them to sign the plan.

1. Click the **Signatures** tab.



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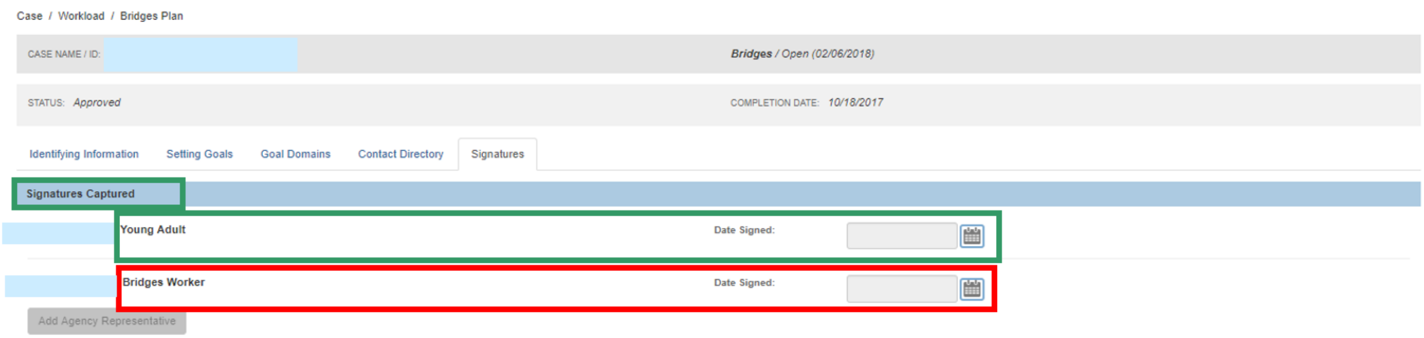
The **Signatures Captured** grid appears.

2. Enter the **Date Signed** in the box beside the Bridges Worker's name.

Note: Once the Bridges Plan is signed, the young adult will sign a physical copy of the plan. The date the young adult signs the plan will then be entered into Ohio SACWIS.



If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).